

Return of Private Foundation  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

2006

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2006, or tax year beginning , and ending

G Check all that apply: ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>ROSE-MARIE AND JACK R. ANDERSON FOUNDATION</b>		A Employer identification number <b>75-2542403</b>
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite <b>16475 DALLAS PARKWAY 735</b>		B Telephone number <b>(972) 248-7350</b>
	City or town, state, and ZIP code <b>ADDISON, TX 75001</b>		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 51,189,192.</b> (Part I, column (d) must be on cash basis.)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	978,400.		N/A	
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	54,100.	54,100.		STATEMENT 2
4	Dividends and interest from securities	1,420,730.	1,420,730.		STATEMENT 3
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	<199,681.>			STATEMENT 1
b	Gross sales price for all assets on line 6a	6,313,660.			
7	Capital gain net income (from Part IV, line 2)		0.		
8	Net short-term capital gain				
9	Income modifications (see instructions)				
10a	Less: Cost of goods sold and allowances				
b	Less: Cost of goods sold				
c	Gross profit (or loss)				
11	Other income				
12	Total. Add lines 1 through 11	2,253,549.	1,474,830.		
13	Compensation of officers, directors, trustees, etc.	63,000.	15,750.		47,250.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees STMT 4	4,910.	0.		4,910.
b	Accounting fees STMT 5	7,675.	1,919.		5,756.
c	Other professional fees STMT 6	34,119.	8,250.		25,869.
17	Interest	1.	1.		0.
18	Taxes STMT 7	180,178.	178.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	1,326.	0.		1,326.
22	Printing and publications				
23	Other expenses STMT 8	16,379.	15,694.		644.
24	Total operating and administrative expenses. Add lines 13 through 23	307,588.	41,792.		85,755.
25	Contributions, gifts, grants paid	2,059,930.			2,059,930.
26	Total expenses and disbursements. Add lines 24 and 25	2,367,518.	41,792.		2,145,685.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	<113,969.>			
b	Net investment income (if negative, enter -0-)		1,433,038.		
c	Adjusted net income (if negative, enter -0-)			N/A	

J

**ROSE-MARIE AND JACK R. ANDERSON**  
**FOUNDATION**

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		4,039,092.	1,304,139.	1,304,139.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations STMT 9		19,239,272.	21,055,280.	20,765,700.
	b	Investments - corporate stock STMT 10		19,962,795.	21,569,131.	28,737,142.
	c	Investments - corporate bonds				
Liabilities	11	Investments - land, buildings, and equipment basis ▶				
		Less accumulated depreciation ▶				
	12	Investments - mortgage loans				
	13	Investments - other				
	14	Land, buildings, and equipment basis ▶ 24,833.				
		Less accumulated depreciation STMT 11 ▶ 24,833.				
	15	Other assets (describe ▶ STATEMENT 12)		1,154,779.	353,419.	382,211.
	16	Total assets (to be completed by all filers)		44,395,938.	44,281,969.	51,189,192.
	17	Accounts payable and accrued expenses				
	18	Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ )				
23	Total liabilities (add lines 17 through 22)		0.	0.		
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>	27	Capital stock, trust principal, or current funds		0.	0.
		28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.
		29	Retained earnings, accumulated income, endowment, or other funds		44,395,938.	44,281,969.
		30	Total net assets or fund balances		44,395,938.	44,281,969.
	31	Total liabilities and net assets/fund balances		44,395,938.	44,281,969.	

**Part III Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	44,395,938.
2	Enter amount from Part I, line 27a	2	<113,969.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	44,281,969.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	44,281,969.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b <b>SEE ATTACHED STATEMENTS</b>			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e <b>6,313,660.</b>		<b>6,513,341.</b>	<b>&lt;199,681.&gt;</b>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			<b>&lt;199,681.&gt;</b>

2 Capital gain net income or (net capital loss). { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	<b>&lt;199,681.&gt;</b>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	<b>N/A</b>

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2005	<b>2,042,556.</b>	<b>45,094,653.</b>	<b>.045295</b>
2004	<b>1,725,051.</b>	<b>40,263,433.</b>	<b>.042844</b>
2003	<b>1,750,847.</b>	<b>37,460,116.</b>	<b>.046739</b>
2002	<b>1,783,573.</b>	<b>35,487,368.</b>	<b>.050259</b>
2001	<b>1,826,672.</b>	<b>35,668,342.</b>	<b>.051213</b>

2 Total of line 1, column (d)	2	<b>.236350</b>
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	<b>.047270</b>
4 Enter the net value of noncharitable-use assets for 2006 from Part X, line 5	4	<b>49,032,798.</b>
5 Multiply line 4 by line 3	5	<b>2,317,780.</b>
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	<b>14,330.</b>
7 Add lines 5 and 6	7	<b>2,332,110.</b>
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	<b>2,145,685.</b>

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling letter: _____ (attach copy of ruling letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	28,661.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	28,661.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5	28,661.
6	Credits/Payments:		
a	2006 estimated tax payments and 2005 overpayment credited to 2006	6a	69,805.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	69,805.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	41,144.
11	Enter the amount of line 10 to be: <b>Credited to 2007 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	11	0.

**Part VII-A Statements Regarding Activities**

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	Yes	No
1a			X
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c	Did the foundation file Form 1120-POL for this year?		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2	X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> TX		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2006 or the taxable year beginning in 2006 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

**Part VII-A** Statements Regarding Activities *Continued*

11a	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. (see instructions)	11a		X
b	If "Yes," did the foundation have a binding written contract in effect on August 17, 2006, covering the interest, rents, royalties, and annuities described in the attachment for line 11a?	11b	N/A	
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Web site address ► N/A				
14	The books are in care of ► NEIL R. ANDERSON Telephone no. ► 972-248-7350			
Located at ► 16475 DALLAS PARKWAY, SUITE 735, ADDISON, TX ZIP+4 ► 75001				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	

**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2006?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2006, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2006? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2006 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2006)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2006?		X

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**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** *Continued*

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

X

If you answered "Yes" to 6b, also file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13		63,000.	0.	0.

**2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."**

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

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**Part VIII** . Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *Continued*

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

[illegible]**Total number of others receiving over \$50,000 for professional services**

0

<b>Part IX-A</b>	<b>Summary of Direct Charitable Activities</b>
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List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

## Expenses

1	N/A	
2		
3		
4		

<b>Part IX-B</b>	<b>Summary of Program-Related Investments</b>
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Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	N/A	
2		
All other program-related investments. See instructions.		
3		

**Total.** Add lines 1 through 3

0.

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**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	48,396,117.
b	Average of monthly cash balances	1b	1,380,584.
c	Fair market value of all other assets	1c	2,789.
d	<b>Total</b> (add lines 1a, b, and c)	1d	49,779,490.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	49,779,490.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	746,692.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	49,032,798.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	2,451,640.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	2,451,640.
2a	Tax on investment income for 2006 from Part VI, line 5	2a	28,661.
b	Income tax for 2006. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	28,661.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,422,979.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,422,979.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,422,979.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,145,685.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,145,685.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	2,145,685.

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2005	(c) 2005	(d) 2006
1 Distributable amount for 2006 from Part XI, line 7				2,422,979.
2 Undistributed income, if any, as of the end of 2005				
a Enter amount for 2005 only			2,033,350.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2006:				
a From 2001				
b From 2002				
c From 2003				
d From 2004				
e From 2005				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2006 from Part XII, line 4: ► \$ 2,145,685.				
a Applied to 2005, but not more than line 2a			2,033,350.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2006 distributable amount				112,335.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2006 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007				2,310,644.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2001 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2002				
b Excess from 2003				
c Excess from 2004				
d Excess from 2005				
e Excess from 2006				

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9) **N/A**

**1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2006, enter the date of the ruling ▶

**b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2006	(b) 2005	(c) 2004	(d) 2003	
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
<b>b</b> 85% of line 2a					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test - enter:					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
<b>c</b> "Support" alternative test - enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see page 28 of the instructions.)

**1 Information Regarding Foundation Managers:**

- a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

**SEE STATEMENT 14**

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

**NONE**

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

- a** The name, address, and telephone number of the person to whom applications should be addressed:

**N/A**

- b** The form in which applications should be submitted and information and materials they should include:

**N/A**

- c** Any submission deadlines:

**N/A**

- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

**N/A**

**Part XV** Supplementary Information (continued)**3** Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> Paid during the year				
SEE ATTACHED SCHEDULE				2,059,930.
<b>Total</b>			▶ 3a	2,059,930.
<b>b</b> Approved for future payment				
NONE				
<b>Total</b>			▶ 3b	0.

## Enter gross amounts unless otherwise indicated.

## **Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

623621  
01-29-07

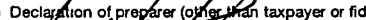

## Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

<b>1</b>	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?	<b>Yes</b>	<b>No</b>
<b>a</b>	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash		<b>X</b>
	(2) Other assets		<b>X</b>
<b>b</b>	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization		<b>X</b>
	(2) Purchases of assets from a noncharitable exempt organization		<b>X</b>
	(3) Rental of facilities, equipment, or other assets		<b>X</b>
	(4) Reimbursement arrangements		<b>X</b>
	(5) Loans or loan guarantees		<b>X</b>
	(6) Performance of services or membership or fundraising solicitations		<b>X</b>
<b>c</b>	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		<b>X</b>
<b>d</b>	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.				
Sign Here	 Signature of officer or trustee		Date 9/26/07	Title President
	Preparer's signature 		Date 9/19/07	Check if self-employed <input type="checkbox"/>
Paid Preparer's Use Only	Firm's name (or yours if self-employed), address, and ZIP code WEAVER AND TIDWELL, L.L.P. 12221 MERIT DRIVE, SUITE 1400 DALLAS, TEXAS 75251		Preparer's SSN or PTIN EIN Phone no. (972) 490-197	

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**Supplementary Information for  
line 1 of Form 990, 990-EZ, and 990-PF (see instructions)

OMB No 1545-0047

**2006**

Name of organization

ROSE-MARIE AND JACK R. ANDERSON  
FOUNDATION

Employer identification number

75-2542403

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)( ) (enter number) organization

☐

4947(a)(1) nonexempt charitable trust not treated as a private foundation

☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**. (Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule-see instructions.)

**General Rule-**☒

For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

**Special Rules-**☐

For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of \$5,000 or 2% of the amount on line 1 of these forms (Complete Parts I and II.)

☐

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. (Complete Parts I, II, and III.)

☐

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000 (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the Parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ) ▶ \$ \_\_\_\_\_

**Caution:** Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they must check the box in the heading of their Form 990, Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions  
for Form 990, Form 990-EZ, and Form 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2006)

Name of organization  
**ROSE-MARIE AND JACK R. ANDERSON  
 FOUNDATION**

Employer identification number

**75-2542403****Part I Contributors** (See Specific Instructions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	<b>MR. &amp; MRS. JACK R. ANDERSON</b> <b>16475 DALLAS PARKWAY, SUITE 735</b> <b>ADDISON, TX 75001</b>	\$ 978,400.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Name of organization

Employer identification number

ROSE-MARIE AND JACK R. ANDERSON  
FOUNDATION

75-2542403

**Part II    Noncash Property** (See Specific Instructions.)[illegible]



**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	REDEMPTION OF 01/06 FFCB 5.625%	P	01/25/01	01/23/06
b	REDEMPTION OF 02/06 FHLB 2.5%	P	03/04/05	02/24/06
c	REDEMPTION OF 02/06 FHLB 6.13%	P	02/20/98	02/27/06
d	REDEMPTION OF 07/06 FHLMC 5.5%	P	01/09/02	07/17/06
e	REDEMPTION OF 10/06 US SY 6.5%	P	05/19/03	10/15/06
f	REDEMPTION OF 11/06 FHLB 3.0%	P	06/23/05	11/08/06
g	300 SH ISHARES TR	P	01/30/06	05/08/06
h	800 SH MITSUBISHI UFJ FIN GROUP	P	04/05/06	06/08/06
i	500 SH AMGEN, INC.	P	02/01/06	06/12/06
j	1,500 SH TYCO, INTERNATIONAL LTD.	P	05/04/06	07/19/06
k	1,500 SH HERCULES, INC.	P	05/12/06	07/21/06
l	1,500 SH MITSUBISHI UFJ FIN GROUP	P	04/05/06	09/15/06
m	400 SH CHESAPEAKE ENERGY CORP	P	01/31/06	09/20/06
n	500 SH NRG ENERGY	P	07/28/06	09/20/06
o	700 SH POWERSHARES GLOBAL WATER	P	01/30/06	09/20/06

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,000,000.		1,007,343.	<7,343.>
b 1,000,000.		992,605.	7,395.
c 1,000,000.		1,020,318.	<20,318.>
d 1,000,000.		1,031,201.	<31,201.>
e 1,000,000.		1,151,405.	<151,405.>
f 999,395.		990,005.	9,390.
g 31,221.		30,333.	888.
h 9,930.		12,157.	<2,227.>
i 33,797.		39,267.	<5,470.>
j 39,603.		41,898.	<2,295.>
k 21,884.		23,752.	<1,868.>
l 19,795.		22,794.	<2,999.>
m 11,577.		13,941.	<2,364.>
n 23,732.		24,426.	<694.>
o 11,873.		12,013.	<140.>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<7,343.>
b			7,395.
c			<20,318.>
d			<31,201.>
e			<151,405.>
f			9,390.
g			888.
h			<2,227.>
i			<5,470.>
j			<2,295.>
k			<1,868.>
l			<2,999.>
m			<2,364.>
n			<694.>
o			<140.>

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7  
If (loss), enter "-0-" in Part I, line 7 }

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):  
If gain, also enter in Part I, line 8, column (c).  
If (loss), enter "-0-" in Part I, line 8

3

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	250 SH FIRST MARBLEHEAD CORP	P	06/16/06	11/03/06
b	1,300 SH NORTH WEST CO FD	P	04/24/06	11/03/06
c	1,100 SH NORTH WEST CO FD	P	04/24/06	11/10/06
d	900 SH NORTH WEST CO FD	P	06/16/06	11/10/06
e	600 SH LILLY (ELI LILLY) & CO	P	04/18/06	12/14/06
f	250 SH LILLY (ELI LILLY) & CO	P	05/05/06	12/14/06
-	-	P	VARIOUS	12/31/06
-	-	P	VARIOUS	12/31/06
-	-	P	VARIOUS	12/31/06
-	-			
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 16,127.		12,693.	3,434.
b 17,080.		15,970.	1,110.
c 14,764.		13,513.	1,251.
d 12,080.		11,784.	296.
e 32,406.		32,728.	<322.>
f 13,502.		13,190.	312.
g 4,873.			4,873.
h 21.			21.
i		5.	<5.>
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			3,434.
b			1,110.
c			1,251.
d			296.
e			<322.>
f			312.
g			4,873.
h			21.
i			<5.>
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	<199,681.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

## 2006 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired			Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	ORGANIZATIONAL COSTS	06	13	94	248	60M	43	22,864.			22,864.	22,864.		0.
2	OFFICE EQUIPMENT	04	15	99	200DB	5.00	17	985.			985.	985.		0.
3	OFFICE EQUIPMENT	06	15	99	200DB	5.00	17	984.			984.	984.		0.
	* TOTAL 990-PF PG 1 DEPR & AMORT							24,833.		0.	24,833.	24,833.	0.	0.

FORM 990-PF                      GAIN OR (LOSS) FROM SALE OF ASSETS                      STATEMENT      1

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
REDEMPTION OF 01/06 FFCB 5.625%	PURCHASED	01/25/01	01/23/06

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,000,000.	1,007,343.	0.	0.	<7,343.>

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
REDEMPTION OF 02/06 FHLB 2.5%	PURCHASED	03/04/05	02/24/06

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,000,000.	992,605.	0.	0.	7,395.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
REDEMPTION OF 02/06 FHLB 6.13%	PURCHASED	02/20/98	02/27/06

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,000,000.	1,020,318.	0.	0.	<20,318.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
REDEMPTION OF 07/06 FHLMC 5.5%	1,000,000.	1,031,201.	0.	0.	<31,201.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
REDEMPTION OF 10/06 US SY 6.5%	1,000,000.	1,151,405.	0.	0.	<151,405.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
REDEMPTION OF 11/06 FHLB 3.0%	999,395.	990,005.	0.	0.	9,390.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
300 SH ISHARES TR	31,221.	30,333.	0.	0.	888.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
800 SH MITSUBISHI UFJ FIN GROUP	9,930.	12,157.	0.	0.	<2,227.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
500 SH AMGEN, INC.	33,797.	39,267.	0.	0.	<5,470.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,500 SH TYCO, INTERNATIONAL LTD.	39,603.	41,898.	0.	0.	<2,295.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,500 SH HERCULES, INC.	21,884.	23,752.	0.	0.	<1,868.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,500 SH MITSUBISHI UFJ FIN GROUP	19,795.	22,794.	0.	0.	<2,999.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
400 SH CHESAPEAKE ENERGY CORP	11,577.	13,941.	0.	0.	<2,364.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
500 SH NRG ENERGY	23,732.	24,426.	0.	0.	<694.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
700 SH POWERSHARES GLOBAL WATER	11,873.	12,013.	0.	0.	<140.>





(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
600 SH LILLY (ELI LILLY) & CO	32,406.	32,728.	0.	0.	<322.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
250 SH LILLY (ELI LILLY) & CO	13,502.	13,190.	0.	0.	312.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
FROM K-1 NGN BIOMED OPPORTUNITY I, L.P.	4,873.	0.	0.	0.	4,873.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
FROM K-1 TEEKAY LNG PARTNERS, L.P.	21.	0.	0.	0.	21.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
	PURCHASED		VARIOUS	12/31/06
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	5.	0.	0.	<5.>

CAPITAL GAINS DIVIDENDS FROM PART IV

0.

TOTAL TO FORM 990-PF, PART I, LINE 6A

&lt;199,681.&gt;

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	AMOUNT
MERRILL LYNCH	51,985.
SF SENTRY	2,115.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	54,100.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BROWN ADVISORY - DIV	33,816.	0.	33,816.
BROWN ADVISORY - INT	35,382.	0.	35,382.
PRIVATE EQUITY FUND, L.P.	37.	0.	37.
	1,376.	0.	1,376.
L.P.	794.	0.	794.
LESS PURCHASED INTEREST: 02/07 FHLB 5.375%	<25,233.>	0.	<25,233.>
LESS PURCHASED INTEREST: 09/09 FHLB 4.75%	<15,569.>	0.	<15,569.>
MERRILL LYNCH - DIV	237,701.	0.	237,701.
MERRILL LYNCH - INT	1,041,258.	0.	1,041,258.
SF SENTRY - DIV	14,327.	0.	14,327.
SF SENTRY - INT	788.	0.	788.
VANGUARD S&P 500 INDEX	96,053.	0.	96,053.
TOTAL TO FM 990-PF, PART I, LN 4	1,420,730.	0.	1,420,730.

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FORM 990-PF	LEGAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL SERVICES	4,910.	0.		4,910.
TO FM 990-PF, PG 1, LN 16A	4,910.	0.		4,910.

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING SERVICES	7,675.	1,919.		5,756.
TO FORM 990-PF, PG 1, LN 16B	7,675.	1,919.		5,756.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MANAGEMENT FEES	33,000.	8,250.		24,750.
CONSULTING SERVICES	1,119.	0.		1,119.
TO FORM 990-PF, PG 1, LN 16C	34,119.	8,250.		25,869.

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FORM 990-PF	TAXES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX ON INVESTMENT INCOME	180,000.	0.		0.
FOREIGN TAXES	178.	178.		0.
TO FORM 990-PF, PG 1, LN 18	180,178.	178.		0.

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FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OTHER DEDUCTIONS					
	21.	0.		0.	
	80.	80.		0.	
	794.	150.		644.	
-	11,472.	11,472.		0.	
V	2,353.	2,353.		0.	
-	20.	0.		0.	
	475.	475.		0.	
-	1,164.	1,164.		0.	
TO FORM 990-PF, PG 1, LN 23	16,379.	15,694.		644.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	9
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
SEE ATTACHED STATEMENT	X		21,055,280.	20,765,700.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			21,055,280.	20,765,700.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			21,055,280.	20,765,700.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	10
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED STATEMENT			21,569,131.	28,737,142.
TOTAL TO FORM 990-PF, PART II, LINE 10B			21,569,131.	28,737,142.

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FORM 990-PF      DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT      STATEMENT      11

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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
ORGANIZATIONAL COSTS	22,864.	22,864.	0.
OFFICE EQUIPMENT	985.	985.	0.
OFFICE EQUIPMENT	984.	984.	0.
TOTAL TO FM 990-PF, PART II, LN 14	24,833.	24,833.	0.

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FORM 990-PF      OTHER ASSETS      STATEMENT      12

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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MISCELLANEOUS RECEIVABLES	0.	0.
INVESTMENT IN SF SENTRY BALANCED EQUITY, L.P.	0.	0.
INVESTMENT IN NGN BIOMED OPPORTUNITY I, L.P.	346,565.	373,041.
INVESTMENT IN CAPITAL PARTNERS PRIVATE EQUITY INCOME FUND, L.P.	1,410.	3,726.
PURCHASED INTEREST	5,444.	5,444.
TOTAL TO FORM 990-PF, PART II, LINE 15	353,419.	382,211.

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FORM 990-PF                      PART VIII - LIST OF OFFICERS, DIRECTORS                      STATEMENT    13  
    TRUSTEES AND FOUNDATION MANAGERS

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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JACK R. ANDERSON 16475 DALLAS PARKWAY, SUITE 735 ADDISON, TX 75001	DIR 3.00	0.	0.	0.
ROSE-MARIE ANDERSON 16475 DALLAS PARKWAY, SUITE 735 ADDISON, TX 75001	DIR, SECR 1.00	0.	0.	0.
NEIL R. ANDERSON 16475 DALLAS PARKWAY, SUITE 735 ADDISON, TX 75001	DIR, PRES, TR 35.00	63,000.	0.	0.
BARBARA ANDERSON MCDONALD 16475 DALLAS PARKWAY, SUITE 735 ADDISON, TX 75001	DIR, ASST SEC 1.00	0.	0.	0.
GAIL ANDERSON CANIZARES 16475 DALLAS PARKWAY, SUITE 735 ADDISON, TX 75001	DIR, ASST TR 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		63,000.	0.	0.

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FORM 990-PF                      PART XV - LINE 1A                      STATEMENT    14  
    LIST OF FOUNDATION MANAGERS

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NAME OF MANAGER

JACK R. ANDERSON  
ROSE-MARIE ANDERSON

**Underpayment of Estimated Tax by Corporations**▶ See separate instructions.  
▶ Attach to the corporation's tax return.**FORM 990-PF****2006**Name **ROSE-MARIE AND JACK R. ANDERSON  
FOUNDATION**Employer identification number  
**75-2542403**

**Note:** Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 34 on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.

**Part I Required Annual Payment**

<b>1</b> Total tax (see instructions)	<b>1</b>	<b>28,661.</b>
<b>2a</b> Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1	<b>2a</b>	
<b>b</b> Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or of section 167(g) for depreciation under the income forecast method	<b>2b</b>	
<b>c</b> Credit for Federal tax paid on fuels (see instructions)	<b>2c</b>	
<b>d Total.</b> Add lines 2a through 2c	<b>2d</b>	
<b>3</b> Subtract line 2d from line 1. If the result is less than \$500, <b>do not</b> complete or file this form. The corporation does not owe the penalty	<b>3</b>	<b>28,661.</b>
<b>4</b> Enter the tax shown on the corporation's 2005 income tax return (see instructions). <b>Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5</b>	<b>4</b>	<b>147,894.</b>
<b>5 Required annual payment.</b> Enter the smaller of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3	<b>5</b>	<b>28,661.</b>

**Part II Reasons for Filing** - Check the boxes below that apply. If any boxes are checked, the corporation **must** file Form 2220 even if it does not owe a penalty (see instructions).

- 6** ☐ The corporation is using the adjusted seasonal installment method.
- 7** ☐ The corporation is using the annualized income installment method.
- 8** ☒ The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

**Part III Figuring the Underpayment**

	(a)	(b)	(c)	(d)
<b>9</b> <b>Installment due dates.</b> Enter in columns (a) through (d) the 15th day of the 4th (Form 990-PF filers: Use 5th month), 6th, 9th, and 12th months of the corporation's tax year	<b>05/15/06</b>	<b>06/15/06</b>	<b>09/15/06</b>	<b>12/15/06</b>
<b>10</b> <b>Required installments.</b> If the box on line 6 and/or line 7 above is checked, enter the amounts from Sch A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% of line 5 above in each col. Special rules apply to corporations with assets of \$1 billion or more (see instr)	<b>7,165.</b>	<b>7,166.</b>	<b>7,165.</b>	<b>7,165.</b>
<b>11</b> Estimated tax paid or credited for each period (see instructions). For column (a) only, enter the amount from line 11 on line 15	<b>49,805.</b>		<b>15,000.</b>	
<b>Complete lines 12 through 18 of one column before going to the next column.</b>				
<b>12</b> Enter amount, if any, from line 18 of the preceding column		<b>42,640.</b>	<b>35,474.</b>	<b>43,309.</b>
<b>13</b> Add lines 11 and 12		<b>42,640.</b>	<b>50,474.</b>	<b>43,309.</b>
<b>14</b> Add amounts on lines 16 and 17 of the preceding column				
<b>15</b> Subtract line 14 from line 13. If zero or less, enter -0-	<b>49,805.</b>	<b>42,640.</b>	<b>50,474.</b>	<b>43,309.</b>
<b>16</b> If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-		<b>0.</b>	<b>0.</b>	
<b>17</b> <b>Underpayment.</b> If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18				
<b>18</b> <b>Overpayment.</b> If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column	<b>42,640.</b>	<b>35,474.</b>	<b>43,309.</b>	

**Go to Part IV on page 2 to figure the penalty. Do not go to Part IV if there are no entries on line 17 - no penalty is owed.**

**Part IV Figuring the Penalty**

	(a)	(b)	(c)	(d)
<b>19</b> Enter the date of payment or the 15th day of the 3rd month after the close of the tax year, whichever is earlier (see instructions). (Form 990-PF and Form 990-T filers: Use 5th month instead of 3rd month.)				
<b>20</b> Number of days from due date of installment on line 9 to the date shown on line 19				
<b>21</b> Number of days on line 20 after 4/15/2006 and before 7/1/2008				
<b>22</b> Underpayment on line 17 x $\frac{\text{Number of days on line 21} \times 7\%}{365}$	\$	\$	\$	\$
<b>23</b> Number of days on line 20 after 6/30/2006 and before 4/1/2007				
<b>24</b> Underpayment on line 17 x $\frac{\text{Number of days on line 23} \times 8\%}{365}$	\$	\$	\$	\$
<b>25</b> Number of days on line 20 after 3/31/2007 and before 7/1/2007				
<b>26</b> Underpayment on line 17 x $\frac{\text{Number of days on line 25} \times \%}{365}$	\$	\$	\$	\$
<b>27</b> Number of days on line 20 after 6/30/2007 and before 10/1/2007				
<b>28</b> Underpayment on line 17 x $\frac{\text{Number of days on line 27} \times \%}{365}$	\$	\$	\$	\$
<b>29</b> Number of days on line 20 after 9/30/2007 and before 1/1/2008				
<b>30</b> Underpayment on line 17 x $\frac{\text{Number of days on line 29} \times \%}{365}$	\$	\$	\$	\$
<b>31</b> Number of days on line 20 after 12/31/2007 and before 2/16/2008				
<b>32</b> Underpayment on line 17 x $\frac{\text{Number of days on line 31} \times \%}{366}$	\$	\$	\$	\$
<b>33</b> Add lines 22, 24, 26, 28, 30, and 32	\$	\$	\$	\$
<b>34 Penalty.</b> Add columns (a) through (d), of line 33. Enter the total here and on Form 1120; line 33, Form 1120-A, line 29; or the comparable line for other income tax returns				<b>34</b> \$ 0.

\* For underpayments paid after March 31, 2007: For lines 26, 28, 30, and 32, use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at [www.irs.gov](http://www.irs.gov). You can also call 1-800-829-4933 to get interest rate information.

JWA

Form 2220 (2006)



**ROSE-MARIE AND JACK R. ANDERSON FOUNDATION**  
**FORM 990-PF, PART II, LN 10 ATTACHMENT - INVESTMENT**  
**12/31/06**

	<u>SHARES</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
<b><u>U.S. GOVERNMENT OBLIGATIONS</u></b>				
2006-02 FHLM 6.13%		1,020,318	-	-
2006-01 FFCB 5 625%		1,007,343	-	-
2006-07 FHLMC 5.5%		1,031,201	-	-
2006-10 UST 6 5%		1,151,405	-	-
2006-02 FHLB 2.5%		992,605	-	-
2006-11 FHLB 3 0%		990,005	-	-
2007-08 FHLB 6 75%		1,060,580	1,060,580	1,009,060
2007-10 FFCB 6.8%		1,021,187	1,021,187	1,011,880
2008-02 FFCB 5%		-	1,000,005	997,500
2008-07 FHLB 5 84%		999,981	999,981	1,011,560
2008-08 FFCB 5 9%		1,035,679	1,035,679	1,012,310
2008-11 US TRY 4.75%		1,102,974	1,102,974	998,710
2009-09 FHLB 4 75% CALL		-	996,255	988,750
2010-07 FNMA 5.25% step		-	1,000,000	997,190
2010-08 FHLMC 4 25%		1,000,000	1,000,000	991,970
2011-02 FNMA 5% CALL		-	1,000,005	994,690
2011-02 FHLMC 5 2%		-	1,000,005	992,770
2013-02 FNMA 4% STEP		1,000,000	1,000,000	981,560
2013-06 FHLB 3.875%		915,442	915,442	940,000
2013-09 FFCB 5 6%		-	1,012,605	998,440
2014-04 FNMA 4 125%		910,547	910,547	948,130
2014-05 FFCB 5 9% CALL		-	1,000,005	995,630
2016-07 FNMA 5%		1,000,000	1,000,000	964,380
2017-01 FHLMC 4 25%		1,000,000	1,000,000	975,380
2018-08 FHLMC 4.25% CALL		1,000,000	1,000,000	982,090
2020-04 FHLMC 5% STEP		1,000,005	1,000,005	973,490
2007-02 FHLB 5.375%		-	1,000,005	1,000,210
TOTAL U S. GOVERNMENT OBLIGATIONS		19,239,272	21,055,280	20,765,700

**CORPORATE STOCK**

PL(PROTECTIVE LIFE)	43,395	1,495,500	1,495,500	2,061,263
SPY (SPDRS) 5/04	9,100	1,002,552	1,002,552	1,288,742
SPY (SPDRS) 8/04	18,650	2,000,406	2,000,406	2,641,213
SPY (SPDRS) 2005	36,850	4,442,064	4,442,064	5,218,697
SPY (SPDRS) 2006	15,500	-	2,004,486	2,195,110
UNH (UNITED HEATH)	99,000	3,976,052	3,976,052	5,319,270
UNH JRA 2006	20,000	-	978,400	1,074,600
UNH 11/2000	11,000	52,813	52,813	591,030
UNH \$40 CALLS 01/19/08	(100,000)	-	(2,271,925)	(1,660,000)
UNH JRA	22,000	1,084,900	1,084,900	1,182,060
UNH JRA 11/2000	22,000	1,724,800	1,724,800	1,182,060

**ROSE-MARIE AND JACK R. ANDERSON FOUNDATION**  
**FORM 990-PF, PART II, LN 10 ATTACHMENT - INVESTMENT**  
**12/31/06**

	<u>SHARES</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
UNH RMA 1998	12,210	998,390	998,390	656,043
UNH RMASPA 08/1999	8,800	497,600	497,600	472,824
VANGUARD S&P 500 INDEX		2,687,717	2,783,770	5,633,426
BAC CAPITAL TRUST	1,800	-	45,746	45,144
CHESAPEAKE ENERGY CORP	850	-	28,409	24,693
DUKE ENERGY	500	-	16,598	16,605
ENSTAR GROUP	600	-	54,270	57,540
FOCUS MEDIA	250	-	16,801	16,598
FIRST MARBLEHEAD CORP	1,500	-	47,564	81,975
FUEL TECH NV	2,350	-	32,993	57,904
GENETECH, INC	600	-	47,173	48,678
ISHARES, INC MSCI JAP INDX FD	3,050	-	44,572	43,341
HOME DEPO	1,000	-	35,039	40,160
MONOGRAM BIOSCIENCES, INC	15,000	-	30,351	26,700
MURPHY OIL	700	-	38,832	35,595
NOVARTIES AG	340	-	19,981	19,530
NRG ENERGY	500	-	24,426	28,005
NEWMONT MINING CORP	500	-	30,838	22,575
PETROCHINA	425	-	46,638	59,832
POWERSHARES GLOBAL WATER	1,800	-	31,282	33,174
STREET TRACKS GOLD TRUST	800	-	46,994	50,568
TITAN	1,500	-	29,403	30,225
TATA MOTORS LTD	2,000	-	32,456	40,860
TEEKAY LNG PARTNERS	1,200	-	35,513	39,972
UNIVISION COMMUNICATIONS	1,000	-	36,114	35,420
URS CORP	600	-	27,330	25,710
TOTAL CORPORATE STOCK		19,962,794	21,569,131	28,737,142

**Anderson Foundation  
YEAR 2006**

	<u>STATUS</u>	<u>PURPOSE</u>	<u>RELATIONSHIP</u>	<u>2006 DONATION</u>
CATO Institute 1000 Massachusetts Ave., NW Washington, DC 20001	Public	Education	None	40,000
Children's Scholarship Fund 7 West 57 <sup>th</sup> Street New York, NY 10019-3404	Public	Education	None	250,000
Columbia Business School 820 Uris Hall, 3022 Broadway New York, NY 10027	Public	Education	None	25,000
Commonweal Foundation 10770 Columbia Pike, Ste 100 Silver Spring, MD 20901	Public	Education	None	40,000
East Meets West Foundation P O Box 29292 Oakland, CA 94604	Public	Education/Health	None	61,430
Endowment for Inner-City Educ 1011 First Avenue, Ste 1400 New York, NY 10022	Public	Education	None	25,000
Grandview Heights T.C. Bldg Fund P O Box 12234 Columbus, OH 43212	Public	Education	None	50,000
Heard Museum 2301 N Central Avenue Phoenix, AZ 85004	Public	Education	None	100,000
Hoover Institution Stanford University Stanford, CA 94305	Public	Education	None	150,000
Kappa Delta Scholarship Fd 3205 Players Lane Memphis, TN 38125	Public	Education	None	25,000

Milton & Rose D. Friedman Fdn One American Square Bbx 82078 Indianapolis, IN 46282	Public	Education	None	250,000
National Academies Intern Program 2101 Constitution Ave., NW Washington, DC 20418	Public	Medicine	None	63,400
National Academies Same as above	Public	Medicine	None	25,000
National Ctr for Policy Analysis 12655 N. Central Expy, Ste 720 Dallas, TX 75243	Public	Health, Educ Welfare	None	40,000
North Texas Shockers 4829 Briar Creek Flower Mound, TX 75028	Public	Education	None	5,000
Pathways, Inc. 175 Milbank Avenue Greenwich, CT 06830	Public	Mental Illness	None	10,100
Scottsdale Healthcare Fdn 10001 N. 92 <sup>nd</sup> Street, Suite 121 Scottsdale, AZ 85258	Public	Health	None	50,000
Student Sponsor Partners 21 East 40th Street, Ste 1601 New York, NY 10016	Public	Education	None	25,000
Vanderbilt University 105 Kirkland Hall Nashville, TN 37240	Public	Education	None	500,000
Vanguard Charitable Endowmt Fund P O Box 3075 Southeastern, PA 19398-9917	Public	Health, Educ Welfare	None	305,000
Vero Beach Museum of Art 3001 Riverside Park Drive Vero Beach, FL 32963	Public	Education	None	20,000
				<hr/> 2,059,930